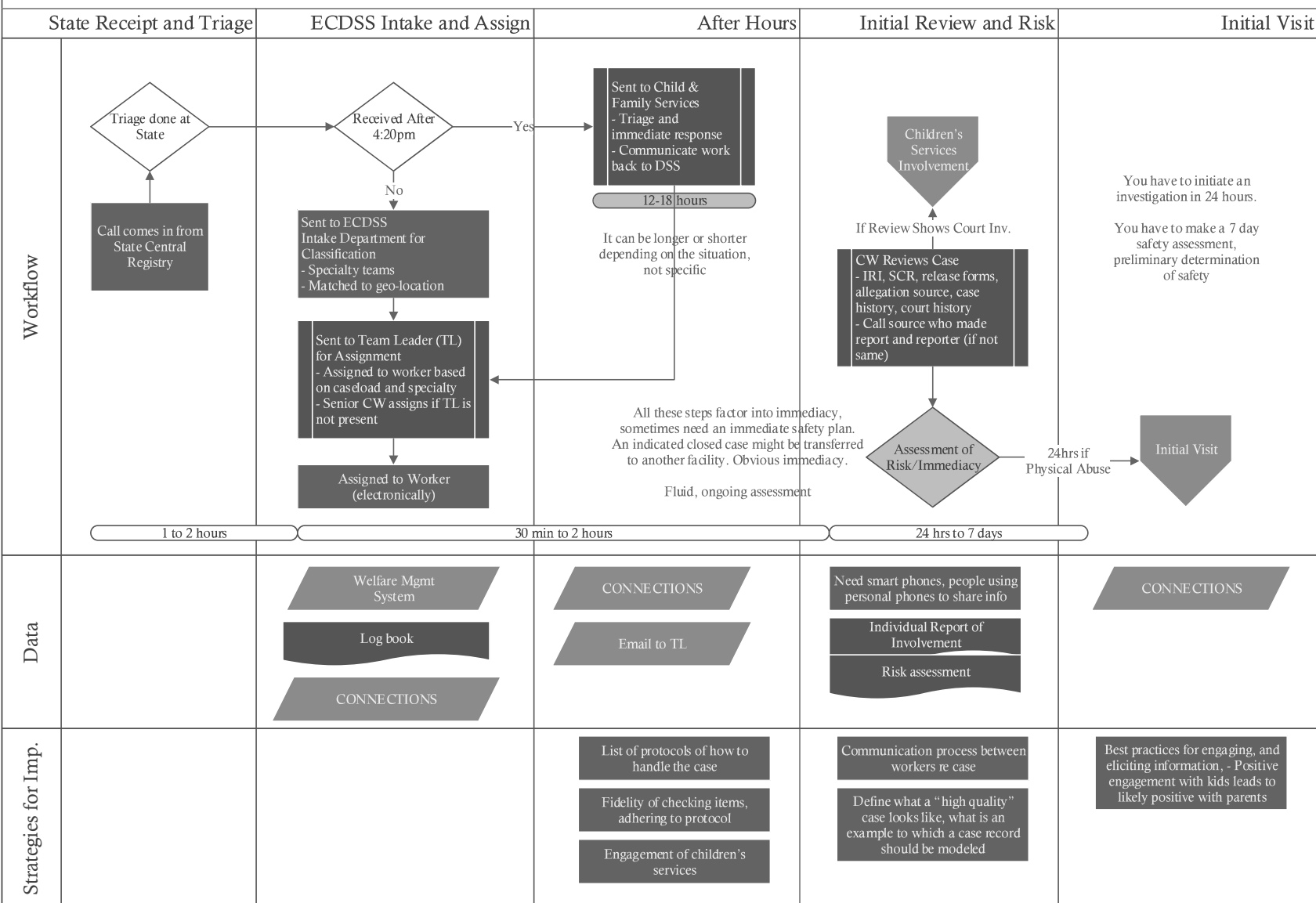
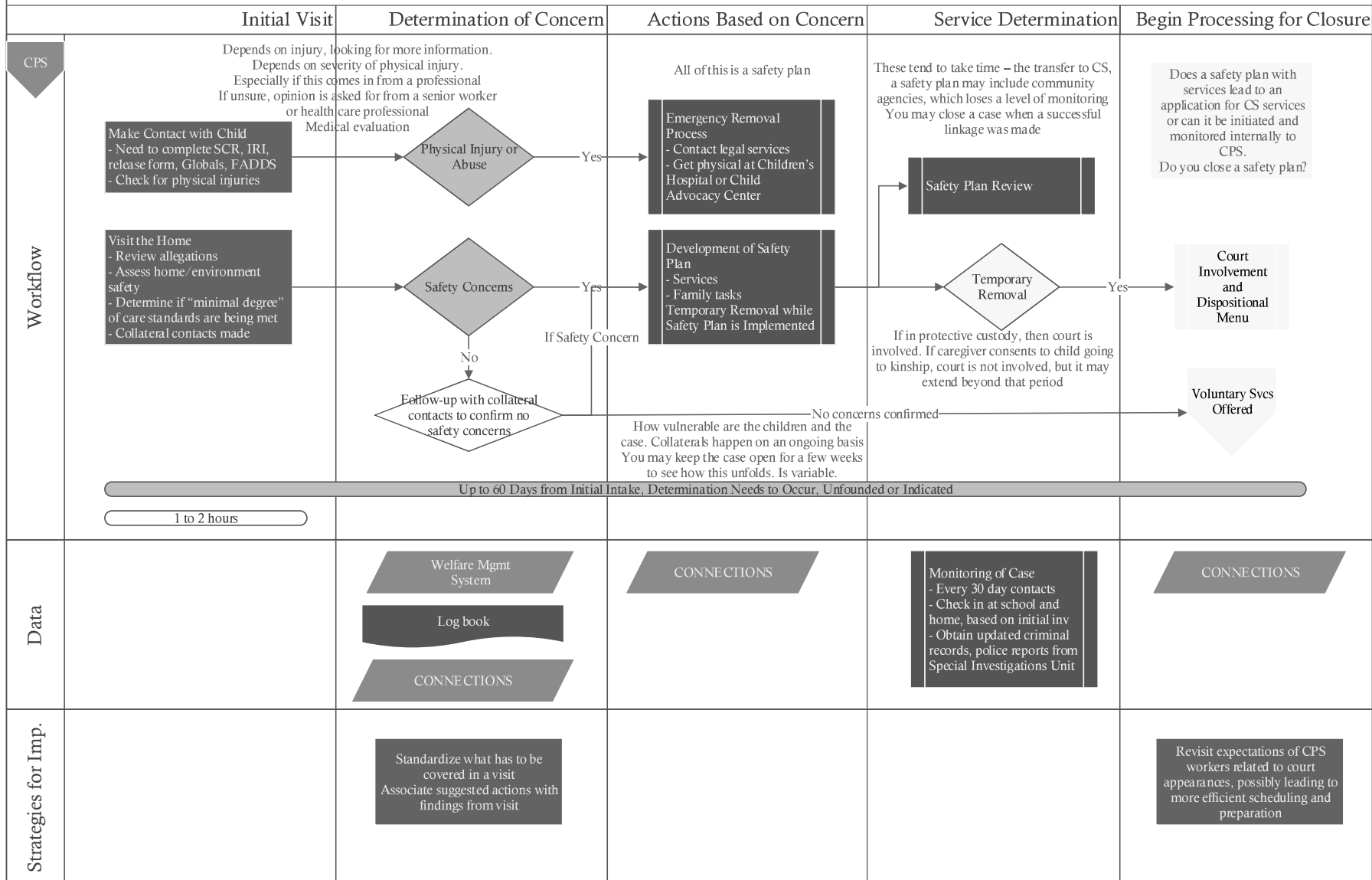


# Child Protection Services



# Child Protection Services - Visits

TOC



| INFRASTRUCTURE  |  |
|---|--|
| Question  | Reply  |
| Where is the application hosted? Does the County have a preference of the vendor hosing or does the County want to hose the solution? Is the County open to cloud solution? | Due to stringent data security requirements, the County was anticipating hosting the solution on its own servers.  |
| Is the county looking for a mobile solution that sends data to a backend system? Can we create a bi-directional interface to your legacy system?                            | Erie County is required to use CONNECTIONS by New York State. It allows read capabilities through the Operational Data Store (ODS) but does not allow an upload of data. A bi-directional interface is not a possibility. CONNECTIONS is not a legacy system. This initiative will replace current paper processes. Erie County utilizes OnBase by Hyland for document retention. For some solutions, this may serve as a backend for storage retention. |
| What browser is utilized in the back-end office and what is the version of the browser?   | Internet Explorer 11<br>Microsoft Windows Server 2012 R2 Standard  |
| What operating system is being used?  | Windows 7  |
| Are there any peak operational black-out periods that should be considered in the project schedule?   | No.  |
| Has the County given any consideration on the number/types of browsers that the Desktop Application would need to support?  | We would prefer to stay on Internet Explorer   |
| What hosting provider are you using today?  | Not applicable.  |
| What are the specifications of the server(s) that the current platform is being hosted on?  | Microsoft Windows Server 2012 R2 Standard  |

| WORKPLAN   |  |
|--|--|
| Question   | Reply  |
| Is any data conversion required?   | No.  |
| Will field staff and management staff be available for participation during the requirements gathering and design periods. | <p>In the proposal, vendor is expected to present a reasonable work plan, including timeline and deliverables, within the response. The Department is anticipating field and management staff to assist throughout the project.</p> <p>Details regarding this will be finalized during contract negotiations after a vendor has been selected.</p> |
| Will there be technical staff available to troubleshoot data integrity issues with ODS data?                               | The ODS is read only. Technical staff will be available to help on any issue. In the proposal, vendor is expected to present a reasonable work plan.   |
| Will the County of Erie provide a Project Manager or single point of contact for the chosen vendor's team?                 | <p>In the proposal, vendor is expected to present a reasonable work plan. The Department is anticipating providing staffing necessary for solution to be successful.</p> <p>Details regarding this will be finalized during contract negotiations after a vendor has been selected.</p>  |
| What is the expected implementation date for the complete solution?  | <p>In the proposal, vendor is expected to present a reasonable work plan, including time line. The Department will take as long as necessary to have a quality solution delivered to its employees, but hopes to have a solution complete as quickly as possible. There is not an "expectation in terms of timeframe".</p>                         |
| Is there an expectation in terms of timeframe and if so, what are the drivers of that timeframe.                           |  |
| Can the County state all the "stakeholders" for this implementation?   | All the stakeholders will be internal, including frontline CPS staff, management, administration and IT staff.   |

| WORKPLAN   |   |
|--|---|
| Question   | Reply   |
| How many of the County's subject matter experts will participate on this initiative?   | Vendor is expected to present a reasonable work plan within the response. This work plan should include required time of the subject matter experts.  |
| Approximately what percentage of time will the County's subject matter experts be assigned to the initiative (on a weekly basis)?          |   |
| Will CONNECTIONS staff participate in the project?   | <p>Vendor is expected to present a reasonable work plan within the response. This work plan should include required time of the subject matter experts.</p> <p>Details regarding this will be finalized during contract negotiations after a vendor has been selected.</p> <p>There is no "CONNECTIONS staff". Staff that work on CONNECTIONS are Child Protective Workers.</p> |
| Will the CONNECTIONS/ODS staff have decision making authority during the project?  | <p>Vendor is expected to present a reasonable work plan within the response. However, the County expects to have a higher-level position make decisions.</p> <p>Details regarding this will be finalized during contract negotiations after a vendor has been selected.</p>   |
| If so, in what areas will they have decision making authority?   |   |
| Will the County's Subject Matter Experts staff be approved/available for any overtime or additional work beyond the normal business hours. | Vendor is expected to present a reasonable work plan within the response. The County will make its staff available, within reason, to work on this initiative.  |

| WORKPLAN   |  |
|--|--|
| Question   | Reply  |
| Approximately how many existing paper documents will need to be imaged and indexed for back file conversion for each entity record on average? |  |
| Is there designated County staff that would assist with this process in regards to differentiating doc types, page splitting, etc.?            | The County does not anticipate converting old records to the current system.   |
| Does the County foresee any potential for Data Conversion for this Initiative.   | Conversion of documents and other paper records has been determined to be not feasible.  |
| Will the County IT staff be able to extract the necessary data in a required format from the current system for conversion.                    | Historic data available through ODS will continue to be available.   |
| How many internal stakeholders will be governing this project?   | The Social Services Family Wellness Division, the Social Services Commissioner's Office and the Erie County Information Technology Departments will be the primary leaders on the project. |
| Are you open to an Agile project management methodology.   | Please put details of the workplan in the RFP. Workplan is expected to be reasonable.  |
| How much intergration with internal Erie County Department of Social Services teams is expected as part of the implementation process?         | The Department will work with vendor to develop a workplan for implementation process. The Department will accommodate reasonable plans in order to have a successful solution.            |
| Will the vendor have direct access to the database populated with the ODS data   | We are determining if we are legally allowed to provide this information. However, at minimum, we will provide "dummy data".   |

| SOLUTION  |   |
|---|---|
| Question  | Reply   |
| Do you require a back-end system in addition to the mobile solution?<br>Would you please explain more of what you are looking for in the desktop application, can it be web-based?  | A back-end system is anticipated that would allow the County to customize the solution.   |
| Is a desktop application required or are you open for a Web Application.  | The desktop application is anticipated to be used by frontline workers to complete work started in the field and supervisors to review the work of  |
| In reference to the requirement on page 6 of the RFP, "The solution must allow reasonable customization by Department staff without engaging vendor", what type of customizations would they like to make?  | Examples:<br>- Basic changes in work processes<br>- Creation of new forms and alterations of existing<br>- Create and customize reports   |
| Please list all required interfaces.  | It is anticipated that the system will interface with OnBase by Hyland for enterprise content management. However, the Department would consider other methods for document retrieval.  |
| Is the output of the visits to upload the documents to OnBase only or will the solution also send data to the warehouse?  | OnBase (or other document retrieval method) would house documents. Although the output will not be going to any other data warehouse, it is expected that any data entered into the system will be able to be extracted for reporting and analysis. |
| What is the average number of pages for each of the 50 forms that are referenced under Mobile Application in the Scope of Professional Services Required on page 5 of the RFP?<br>a. Can the County send a link to the forms or provide copies to bidders?<br>b. Do the forms interact with one another? For example, if a particular value is chosen on one form, does it cause another form to have to be completed?<br>c. Will the forms change between the project kick-off and implementation?<br>d. How frequent are the forms revised? | Most documents are 1-2 pages long.<br>a. Will be available on August 1.<br>b. No. Most of the forms will have shared information – such as child's information.<br>c. It is not anticipated that they will change.<br>d. Rarely.                    |
| Does the solution need to support multiple languages?   | Some forms that require the user to sign may be required to be in Spanish.  |

| SOLUTION   |   |
|--|---|
| Question   | Reply   |
| Will the mobile worker carry a scanner with them?  | It is anticipated that the camera in the device will scan documents.  |
| Approximately how many correspondence(s) does the County use today - that will need to be integrated into the solution.  | Unsure of the meaning of "correspondence".  |
| Approximately how many reports does the County use today?<br><br>Can the County provide an approximate number of reports by subject areas?   | Due to the lack of electronic system, the reports in use today are from hand-counts. In general, the reports that we hope will be generated are counts of various actions taken on cases (eg, number of medical referrals taken on cases).  |
| Can the County confirm that they will continue to use OnBase by Hyland (as their document and image storing software) for this implementation.   | It is the preference of the County to use OnBase. However, if there is a product that provides the same functionality as OnBase that is required for this solution, the County will still consider that solution.   |
| Will the mobile application need an integration back with CONNECTIONS.   | Currently, NYS does not allow integration. Caseworkers are still required to use CONNECTIONS. This initiative will automate the work caseworkers do apart from CONNECTIONS.   |
| Can the County elaborate on the statement "The mobile application must allow worker to access client documentation available through ODS ..." as it relates to the documentation stated on ODS where it's mentioned that the "Stakeholders cannot use the ODS as the backend database for application and reporting systems".<br><br>Is the assumption correct that the mobile app will be connecting with the SQL Database (which receives the nightly updates from ODS). | The ODS will be used to extract information that will be used within the initiative. Users will only have access to a small amount of information available through the ODS. It will not serve as the backend database.<br><br>The solution is expected to connection with SQL Database with ODS information. |
| Is the County aware of and is willing to share any existing risks to this initiative.  | Highest risk of this initiative is security of data.  |
| Are you willing to consider the platform (DOT.NET or JAVA) proposed by vendors.  | Yes. However, preference may be given to solution that utilizes skillsets that already exist in County.   |
| Does the County have a preference of the vendor hosting the solution over an on premise solution?  | The County is anticipating an on premise solution. However, it will consider a vendor hosted solution.  |
| Is the County open to Entrust-IdentityGuard Authentication instead of Active Directory for Mobile and Desktop Application.   | No. If Active Directory is unable to be used for log-in, a separate log-in method would be required.  |



| SOLUTION   |  |
|--|--|
| Question   | Reply  |
| Does anyone external to the organization need to interact with the solution?   | Not at this stage. However, a future expansion may include external user getting access to some information.   |
| Will users need to access the solution from Outlook?   | No. Emailing documents created in the solution is a desired feature.   |
| Which types of mobile devices will be used for this solution? Windows, Android, iOS.   | The County does not have a preference on the device type. The vendor should be mindful that the County will have to maintain the device.   |
| Will data be derived from any other line of business system? For example, is there data housed in CONNECTIONS or an Access database that could be leveraged.   | It is anticipated data from ODS will be leveraged. No other data is collected and available.   |
| What types of documents are associated to these cases? Can we see examples?  | We will provide examples.  |
| - Can some of these documents that are used today be recreated into electronic forms? If so, which ones?   | Yes. We expect all.  |
| - Are all documents created at the start of a case, or will there be documents already created that will be referenced in this case?<br>- If there are, where are these associated documents today? Are they paper or scanned/digital? | Not all documents are started at the beginning of a case. New documents will be generated as a result of information discovered during an investigation.   |
| - Are associated documents grouped in a specific way? If so, what criteria is used to group documents?   | Groupings could include legal, medical, school, police, psychiatric, other treatment providers   |
| How long do you need to retain the data captured in this solution.   | Until the youngest child involved in a case turns 28 years old.  |
| How are cases initiated? By a trigger document (form) or manually, by a user?  | It is anticipated that cases will be initiated by a trigger document completed by the CPS Intake unit after a report is received through the CONNECTIONS system.   |
| Are there specific tasks which should be completed in specific stages and require visibility to completion (e.g., phone calls completed, visits made, paperwork completed)?  | Yes.   |
| Does the solution need to send notifications to users? What is the nature of those notifications? When do they need to be sent?  | This functionality may be redundant with the capabilities with the CONNECTIONS system, so we do not believe this is needed currently. However, we would like the system to have notifications as a possibility for future expansion. |
| Are there restrictions on who can see cases.   | Yes. Case files need to be limited to specific worker and their supervisor.  |
| Are there restrictions of who can see cases at particular stages.  | Yes. After intake, those workers will not have access to those files.  |

| SOLUTION  |  |
|---|--|
| Question  | Reply  |
| Are there restrictions of who can see specific case data fields at particular stages?   | No.  |
| Are there restrictions on who can see the documents associated with a case.   | No.  |
| If desired, please confirm the number of in-office desktop scanners the county would like to purchase.  | If this is planned within the response (because a particular type of scanner is recommended or necessary), please indicate so and include ten scanners.  |
| Would you like a Test Training environment set-up.  | Yes  |
| Can the solution be completely custom or have you investigated canned-solutions?  | Both custom and canned solutions will be considered for this project.  |
| What are requirements for Device/OS Support?  | If this is not provided by your solution and you recommend a third party solution, please indicate so.   |
| What depth of customization is required, could you give examples?<br>Customized Reports, Customized Forms, etc.   | Simple changes in work processes (eg, Form X is assigned to child protective worker instead of supervisor; making a form optional instead of mandatory) or changes to existing forms (eg, Adding a phone number field) |
| Scanning of documents - is searching required for scanned documents? Or are documents just accessed via case number?  | Case number and document type.   |
| What security requirements/compliance are required? (PCI, HIPAA, FERPA, etc)  | HIPAA, FERPA, NYS Social Services Privacy Laws   |
| What constitutes a legally binding signature?   | In compliance with the Electronic Signatures and Records Act. (See: <a href="https://its.ny.gov/sites/default/files/documents/G04-001.pdf">https://its.ny.gov/sites/default/files/documents/G04-001.pdf</a> )          |
| By using the phrase, "wipe mobile device" do you (A) Want to wipe the software application and its associated data; or (B) do you want a mobile device management application that can manage the entire device including data? | Mobile device management application that can manage the entire device including data.   |
| Do you have the desktop application to be able to import files created by a scanning application.   | Yes.   |
| What file types are required to be uploaded onto onbase by hyland (or other document management system) from forms and images.  | PDF and JPEG   |

| SOLUTION  |   |
|---|---|
| Question  | Reply   |
| What type of file does the solution create when it builds a report for each person named in a report?             | This is for cross-referencing and being able to easily pull all the records associated with a certain person. There will always be a unique identifier (Person ID) for each person to search by.  |
| How many desktop/mobile users are required?   | 150 mobile/desktop<br>50 desktop (only)   |
| Who are the users of the mobile app.  | Child Protective Workers  |
| What type of login mechanisms will be used in the mobile application.   | Please provide this information in the response.  |
| Can you clarify what information in each of 50 forms and fields needs to be auto-populated.                       | Most of this information is personal and household information (name, address, SSN) that will repeat on each form. Other information may be customized on each that will require user to fill in, such as name of school.   |
| What basic functionalities are needed for offline capability.   | Complete forms and accept signatures.   |
| What will be the length of audio, video recording? Will it be necessary to upload these audio, video from server? | Less than ten minutes. Does not need to be kept on server.  |
| Do statistic reports be required on mobile device?  | No.   |
| Elaborate on the mobile device being able to scan documents.  | They should be about 300 dpi. An example of an item that would be scanned would be an attendance record from a school. Practically everything scanned in field would be less than five pages. Preferred format would be a PDF. We anticipate using the camera on the mobile device. |

| TRAINING AND SUPPORT  |   |
|---|---|
| Question  | Reply   |
| Is on-going Tier 1, 2 and 3 support part of the solution to be provided by the vendor?                              | The County has its own help-desk and IT staff, so Tier 1 and 2 support is not expected to be needed. Tier 3 support may be needed on an as-needed basis. Ongoing expenses for Tier 3 support should be included in the budget as an on-going expense. |
| Does training include training the 150 frontline CPS workers along with the supervisors and other management staff. | User training must include, at minimum, train the trainer and provide training materials. Any additional training provided by vendor should be described in the solution and included within the budget if there is a cost.                           |
| How many staff members will be included in the statement, “The solution must include user training”?                | User training must include, at minimum, train the trainer and provide training materials. Any additional training provided by vendor should be described in the solution and included within the budget if there is a cost.                           |
| Has the County given any consideration to the format of training (virtual, classroom based, digital, etc.)          | Details regarding this will be finalized during contract negotiations after a vendor has been selected.   |
| What are the expectations for support? Tickets, Live Chat, 24/7, SLA, etc.  | Erie County expects to be able to provide day-to-day support for solution. However, we would expect support for any catastrophic failure as part of any software maintenance agreement.   |

| COST  |   |
|---|---|
| Question  | Reply   |
| Does the County currently have tablets or does the vendor need to price the tablets for the mobile workforce? If you do not have tablets, is there a preference on what type of tablets are proposed. | Erie County does not have tablets currently and the vendor should include price of tablets. There is not a preference on the type of tablet. However, the RFP does specify that the solution must allow administrators to remotely wipe mobile device.                        |
| Does the vendor need to include software to remotely manage the device within the bid?  | Yes.  |
| Does the County have an approved budget?<br><br>If yes, would you be willing to share the budget so vendors can appropriately scope the project.  | The Department will not be sharing the budget it has for this project. Although the County anticipates utilizing a fixed-price contract, if the vendor does not have a fixed price or off-the-shelf product, vendor may structure the response indicating time and materials. |
| Do you have scanners/indexing system that you currently use? If yes, what is it? If no, then does the County intend that the vendor include them in the bid/response?                                 | The County currently scans documents into its OnBase system from Xerox printers. If specialized software and equipment is required, please indicate so in the proposal.   |
| From a desktop application, for scanning documents into the system, will a physical scanner be present.   | If not, please indicate that the County will be responsible for scanning.   |
| An excel pricing document was referenced in the RFP. Is there a specific template to be used.   | No. Please break out costs as described on Page 12.   |
| Do you have preferred billing terms?  | We anticipate utilizing a fixed-price contract. Details regarding paying will be determined during negotiations. However, as a governmental entity, please be aware that we have strict rules governing our contractual operations.   |

| BACKGROUND   |  |
|--|--|
| Question   | Reply  |
| What is the Application Tracking System (in MS Dynamics CRM) used for? Does the solution require an interface to it?   | <p>The Application Tracking System is used in the Department to track applications of welfare benefits. The solution is not expected to interface with it.</p> <p>This information was included in the RFP because one the skillsets of the IT staff is .NET framework and it would be our preference that we are able to utilize the existing talents of the IT staff who will maintain the solution.</p> |
| What is the Microsoft Access product used for? Does the solution require an interface to it?   | Microsoft Access databases are used throughout the Department for various matters. No interface is planned.  |
| How are deletes handled by ODS.  | ODS is read only.  |
| Can the County please confirm 150 mobile users.  | The Department anticipates 150 mobile users.   |
| <p>Does the County have a business plan for this initiative? Can they share with us?</p> <p>If the entire business plan cannot be shared, can you share the top 5 business drivers for this initiative?</p>  | <ol style="list-style-type: none"> <li>1. Time spent on paperwork</li> <li>2. Worker satisfaction</li> <li>3. Standardize processes</li> <li>4. Document and Record Retention</li> <li>5. Data transparency</li> </ol>   |
| Does the County have any hard stops to align with any of their other existing initiatives?   | No.  |
| <p>Can the County please provide more details on how "clean" their data is in the ODS system? Is there referential integrity on the database?</p> <p>Has any data profiling been performed on the data?</p> <p>Is there a list of known data issues available? If not, what are the most current concerns with the data?</p> | <p>ODS is a local SQL Server database that stores a one way data feed from CONNECTIONS. We have no control over how the data is extracted by the state from the main CONNECTIONS data store. We have no way of verifying the integrity of the data.</p>  |

| BACKGROUND  |  |
|---|--|
| Question  | Reply  |
| Can the County share the high level entities (ie, subjects of interest) that gets downloaded on the Operational Data Store (apart from Client, Case Assessment and Service)?  | <p>Please rephrase question.</p> <p>Not sure what they are asking here. If they are asking, in general, if data can be made available, then the answer is yes. If they are asking for a list of specific fields, then I need to know (in addition to the ones listed) which ones they want. The state determines the data fields to send in the data feed.</p> |
| What is Microsoft Dynamics CRM software being currently used for by the County as it relates to this initiative?  | No connection to this initiative. However, staff responsible for maintaining Dynamics CRM will be same staff responsible for maintaining this solution.  |
| Can the County share the as-is logical architecture diagram as it relates to this initiative?   | One has not been developed.  |
| Can the County elaborate on how the documents related to a particular case gets transferred between CONNECTIONS and OnBase?   | Paper-based case files are maintained separate from CONNECTIONS. These paper-based case files are not stored in OnBase.  |
| Can the County confirm that these processes are already in place and are out of scope for this initiative.  | CONNECTIONS is required to be used by New York State to input case notes.<br>These processes are not currently in place.   |
| Of the 150 frontline CPS workers which spend the majority of their time working in the field, 30 supervisors and other management staff members, and 20 clerical staff members, how many and how often will these business users be interacting with the solution | It is anticipated that all workers will spend approximately 50% of their time interfacing with the solution in some manner.  |
| Are cases assigned to specific users?   | After a case gets accepted, it is assigned to a Team Leader (front line supervisor) who then assigns it to a Child Protective Worker.  |
| What are the criteria for assigning users to cases?   | Type of allegation, geographic location, caseload of workers.  |

| BACKGROUND   |   |
|--|---|
| Question   | Reply   |
|  | <ul style="list-style-type: none"> <li>- Intake</li> <li>- Assigned</li> <li>- Ready for Closure</li> <li>- Closed</li> </ul>                 |
| What are the stages or status of a case (e.g., Open, Closed, Assigned, In Progress, Disputed, On Hold, etc)  | A case may then be transfered to Children's Services, which is out-of-scope for this project.   |
| How does a case move from one state to another? Are there specific events which occur that cause the case to progress (e.g., documents received, payment made, etc.)?  | Most of the movements are made by worker determination (in consultation with supervision).<br>Some changes may result from court involvement. |
| Is the County aware of and is willing to share any existing dependencies for this initiative?  | None.   |
| Does Erie County currently have a fax server solution.   | No. If the solution does not include this functionality, please indicate so and/or include information on recommended option.                 |
| Do you have a 3rd party fax service that the application can email a document to via the mobile device   |   |
| Does Erie County know the current daily volume of faxes? And how many fax lines?   | Unknown.  |
| Confirmation on user counts to be quotes?<br>150 frontline mobile staff<br>20 clerical<br>30 supervisors   | User counts confirmed. Numbers may switch in final negotiations.  |
| No other department are being considered at this time?   | Although this RFP is only for CPS, this solution may serve as the building block for other child welfare programs.                            |
| Does Erie County have a preference for an on-shore or off-shore delivery model in this effort?   | The preference would be for on-shore.   |
| Do you already use a Mobile App Management system (i.e., MobileIron)   | No  |
| How are CPS reports delivered to the County?   | Electronically through the CONNECTIONS system.  |
| Will there be an opportunity for bidders to interact with the County on a 1:1 basis to document workflow requirements for the sake of producing an accurate estimate of work required and an overall accurate proposal | If requested, yes.  |



| BACKGROUND   |       |
|--|-------|
| Question   | Reply |
| Does the county have an established cellular data vendor and contract? | Yes.  |

## **What is the County's M/WBE policy?**

[http://www2.erie.gov/eo/sites/www2.erie.gov/eo/files/uploads/pdfs/LocalLaw\\_09-2005.pdf](http://www2.erie.gov/eo/sites/www2.erie.gov/eo/files/uploads/pdfs/LocalLaw_09-2005.pdf)

## **How can we upload information onto onBase?**

Erie County currently owns the following which should allow agency to upload documentations. Erie County has existing expertise in configuring onBase to assist vendor.

1. Document Import Processor (DIP) provides the ability to automatically import, classify and index high volumes of documents, regardless of electronic file type. DIP is typically used to process output from external scanning services, legacy applications and third-party capture systems into OnBase. Powerful configuration and flexible scheduling options allow DIP to import from any text formatted index file and perform unattended processing during off-peak hours.
2. COLD/ERM takes data from business applications and turns that data into fully indexed and widely accessible reports and documents—viewable in an instant by any authorized user or multiple users at the same time. With COLD/ERM, analysts no longer have to wait for IT to deliver reports run from multiple legacy systems—reports simply run overnight, are available to users at the start of the day and can even trigger process workflows. This extends the value of existing legacy systems. OnBase Overlays make data streams look like the documents users expect—whether receivables aging reports or invoices. With COLD/ERM, staff has real-time snapshots into enterprise transactions and documents ready to approve, e-mail, fax or print, keeping processes moving.
3. Virtual Print Driver appears as a standard printer in Windows applications and enables users to electronically print documents directly into OnBase. The printer can prompt for an import dialog or can save the documents into a network directory to be swept into a scan queue. Virtual Print Driver can eliminate the expensive practice of printing documents in order to scan them back into OnBase.
4. E-Forms are fully customizable HTML-based forms that can eliminate the labor and cost associated with processing, importing and indexing forms in any business process. E-Forms can also drive business processes in Workflow, improving the visibility of enterprise information and shortening cycle times. Increased speed and accuracy of data capture—along with greater control—increases the value of data across the enterprise.
5. Unity Forms are the future of OnBase electronic forms, simplifying the creation and speeding the implementation of advanced forms. Form creators use an integrated, point-and-click Forms Designer that greatly reduces the time and specialized skill required to build forms for use in OnBase. For end users completing forms, advanced controls add functionality like data validation, dynamic rules and actions, calculations and more, with a consistent experience across devices.
6. Front Office Scanning (FOS) is an easy to use and configurable solution for capturing customer documents at a point of registration or front office service area. It simplifies the capture process by using information from a business system to index the matching documents when they are scanned. Front Office Scanning can be launched from a business application screen with a single click. It provides simple scanning, imaged form mark-up, and E-Form entry, all from a simple user interface. FOS replaces the office copy machine and uploads the indexed documents directly to an OnBase system.

7. Application Enabler provides complete interaction between a business application screen and the related OnBase documents, content and process management. Users can opt for a real-time, no-click display of documents associated with their enabled screen, or access documents and processes with a simple mouse click or key press. Business systems can be configured without custom programming, scripting or modifications. Application Enabler (AE) can integrate with virtually any application, and has a proven track record with hundreds of applications.
8. Report Services gives organizations the ability to gain valuable information about system and business health. Report Services is an easily deployed application that includes over 140 pre-configured reports for evaluating a complete picture of OnBase and the repositories and processes it manages. Organizations can also create their own custom reports to meet their specific business reporting needs. Long-term reporting functions enable businesses to analyze trends, share productivity information across the organization, and make proactive decisions based on solid data.
9. Document Retention manages the retention and disposition of stored documents according to predefined business rules per class of document. The destruction process is initiated by the passage of time, allowing for automatic destruction and/or removal from OnBase. As a result, organizations avoid fines and reduce legal risks associated with expired content. Document Retention is often the initial, critical component of a completely automated records management solution.
10. Workflow is an automation engine and electronic routing system that enables organizations to process work faster and more efficiently. A rich set of point-and-click configurable rules and actions allows business processes to be quickly automated with no need for custom programming. Workflow enables organizations to significantly decrease document processing time, increase staff productivity and improve input, storage, and retrieval accuracy through a simple and flexible user interface.
11. WorkView | Case Manager provides case workers with a 360° view of all the information they need to drive the—often unpredictable—work that requires their knowledge and expertise. A complete toolkit enables the creation and rapid deployment of “document aware” case management solutions that are natively integrated with the OnBase suite of products. Organizations can eliminate disparate data management methods, such as spreadsheets and departmental databases. Whether managing service requests, resolving issues or qualifying opportunities, control all aspects of the case including tasks, documents, forms, and events. Make better business decisions and maximize productivity by connecting the right people with the right information at the right time.
12. Document Composition improves outgoing correspondence by leveraging existing data—from OnBase or third-party systems—and automating the generation of Microsoft Word documents. Documents are created faster and workers are more productive because they don't have to search multiple information sources and manually produce business documents. Organizations can avoid potential legal and compliance risks by producing accurate, standardized documents and communications.
13. Integration for Esri leverages both investments by connecting documents to geographic map features. Documents related to a map location can be retrieved with a click, eliminating inefficient application switching. Users can upload documents and create forms directly from the map, automatically indexing them with map feature metadata. OnBase users can display documents on an Esri map, improving decision making based on location information. With a point-and-click configuration

utility, out-of-the box solutions can be rapidly implemented without the cost of custom code. Put your documents on the map with OnBase!

14. Advanced Capture brings automatic data extraction to OnBase capture solutions. Predefined forms and rules, combined with a powerful processing engine, make it possible to quickly classify and index more scanned documents with fewer employees. Automating document indexing eliminates the bottleneck associated with manually indexing high volumes of structured business documents. Advanced Capture processing can be more accurate and much faster than manual data entry. Employees spend their time more effectively, validating or correcting questionable values only when needed, while letting the Advanced Capture processor perform the mundane task of document indexing.

15. Document Knowledge Transfer and Compliance (DKTC) enables organizations to manage policy and procedure administration end-to-end. DKTC ensures all employees have access to the most up-to-date versions of required materials and that deadlines for review and acknowledgement are enforced. With compliance testing, easily gauge employees' comprehension of distributed content via scoring reports and test certificates.

16. Folders allow users to view and organize documents electronically, just as they would with a folder of paper documents, but with the added benefits and security offered by OnBase. Users are able to access related documents in a way that is familiar, intuitive and easy to use. Folder structures can be automatically created and populated without user interaction, based on business needs and categories.

17. Bar Code Recognition Server provides the capability for a single workstation to provide bar code recognition for several or many scan stations. Bar codes are used to automatically separate, classify, and index the documents within scanned batches, reducing the need for manual data entry and eliminating user error. This provides the capability to utilize bar codes for document indexing across an organization without needing to purchase Production Document Imaging licenses for each scan station.

18. Bar Code Generator works in the background, creating bar code cover sheets that automate document indexing for scanned documents. The bar codes are uniquely formatted for automatic identification within OnBase Production Document Imaging, as document types or specific keyword types, without any additional configuration. Included with Application Enabler, the Bar Code Generator receives index data from enabled business application screens to eliminate duplicate data entry. It can also be used as a standalone application, where bar code values are entered manually. Documents are automatically classified and indexed when scanned into OnBase.

19. Mailbox Importer automatically classifies and stores incoming e-mails and attachments from an organizations designated e-mail inboxes. It brings in those business-critical documents from your customers and business partners, and can classify them and send them directly to Workflow, so your business processes that include e-mails can be more efficient. When used with Workflow, users can access e-mails directly in OnBase Workflow without needing to find them or import them from e-mail system inboxes.

**Is there a preference from Erie County on hardware warranty (number of years/level of coverage)?**

No.

**Will Erie County allow demonstrations?**

Bidders, at their request, may provide a demonstration of their solution to the scoring committee after the bid submitted.

**What format must the documents be in?**

State archive rules require tiff or pdfa.

**If there a preferred system?**

A tablet is preferred to a mobile phone system. Open to operating systems ios or android, and Windows 8 or 10 would be okay.